

**CITY PENSION FUND FOR FIREFIGHTERS AND
POLICE OFFICERS IN THE CITY OF MIAMI BEACH
REQUEST FOR PROPOSAL FOR
PENSION ADMINISTRATION SOFTWARE
PROVIDERS APRIL 22, 2024**

SECTION 1- GENERAL INFORMATION

A. INTRODUCTION/BACKGROUND

The City Pension Fund for Firefighters and Police Officers in the City of Miami Beach (“Plan”) is requesting proposals for a comprehensive Pension Administration System (PAS). This request for Proposal (RFP) is offered to solicit responses from qualified vendors interested in providing the products and services outlined herein for implementation of a PAS. The Plan wishes to contract with a single vendor with demonstrated experience implementing pension administration systems for retirement systems with defined benefit plans similar in size and complexity.

The Retirement System was created under and by authority of Chapter 23414, Laws of Florida, Special Act of 1945. The purpose of the Plan is to implement the terms and conditions under which retirement benefits will be provided to firefighters and police officers in the City of Miami Beach. The Plan is a defined benefit plan qualified under Internal Revenue Code Section 401A, governed by Florida Statutes 112, 175, and 185. Members eligible to participate in the Plan are full time police officers and firefighters employed by the City of Miami Beach.

The Plan is administered by a nine member Board of Trustees (“Board”). The Board employs an Executive Director, an Assistant Executive Director, a Pension Administrator, and an Office Manager to assist with its administrative functions.

Additional information in regard to the membership, plan administration, eligibility, creditable service, and retirement benefits can be found at the plan’s website, <https://www.miamibeachfl.gov/city-hall/fire-police-pension/>

The Plan is seeking proposals for a comprehensive Pension Administration System (PAS) to replace their current legacy system. The Plan has limited resources and does not have access to technical resources to make changes or support a PAS application. Therefore, responding vendors must provide a solution that meets or exceeds the required functionality and is fully supported by the vendor after implementation. The following are the business objectives of the new PAS:

- Improve the quality of service provided to membership
- Increase the Plan’s efficiency of processing member benefits
- Implement a solution that consolidates various related information into a single interface
- Provide members online access to information
- Improved product support
- Establish processes for business continuity

The Plan currently uses a locally developed application, in addition to various spreadsheets and databases to support the pension management process. The system in use today is unique to the Plan and is not supported by a Vendor who is modifying and maintaining a standard system. To achieve the required functionality relies heavily upon institutional knowledge, and the experience of those who have been meeting the needs of the Plan for many years. With greater capabilities and improved functionality, the approach might change to take advantage of improved functionality and system capability. A vendor supported model would offer the Plan an ability to better serve the members and reduce risks relating to technology gaps or challenges.

Due care and diligence has been exercised in the preparation of this RFP and all information herein is believed to be substantially correct. However, the responsibility for determining the full extent of the exposure to risk and verification of all information herein shall rest solely on those parties making Proposals. The Board, its representatives, and its agents shall not be responsible for any error or omission in this RFP, nor shall they be responsible for the failure on the part of any Respondents or their representatives to verify the information herein and to determine the full extent of that exposure.

B. PROPOSAL SUBMISSION

Sealed proposals must be received by the Plan at the following address by May 31, 2024, **by 3:00 p.m.** Eastern Standard Time. Proposal should be mailed to:

Donna Brito, Executive Director
City Pension Fund for Firefighters and Police
Officers in the City of Miami Beach
1691 Michigan Avenue
Suite 355
Miami Beach, FL 33139-2573

Proposals shall contain:

One (1) original and six (6) copies of a technical proposal in hard copy. One

(1) original and six (6) copies of a cost proposal in hard copy.

In addition, one (1) electronic copy of the complete proposal must be emailed to the Executive Director at donnabrito@miamibeachfl.gov. (Receipt of the electronic proposal shall not be substitute for the hard copy submission deadline).

Proposals received by the Plan after the proposal submission date will not be considered. All proposals shall be valid for a period of 180 days from the submission due date.

Any and all costs incurred by the vendor in response to this RFP prior to the execution of a contract will be the sole responsibility of the vendor. Except for trade secrets and confidential information which the Proposer identifies as proprietary, all Proposals will be open for public inspection after the contract award.

The Plan reserves the right to reject any or all proposals if determined to be in the best interest of the Plan.

The Board shall consider the submittal of a Proposal by a Proposer as constituting an offer by the Proposer to perform the required services at the stated fees. This RFP and the selected Proposal in response to this RFP will be incorporated into the contract resulting from this solicitation; provided, however, that the contract may contain terms different from or in addition to this RFP and the successful Proposal as may be deemed necessary or advisable by the Board.

The following table provides a schedule for the activities associated with this RFP. The scheduled activities may change without notice.

Activity	Scheduled Date
RFP Released	April 22, 2024
Questions Due from Vendors	May 6, 2024
Response to Vendor Questions Posted	May 13, 2024
Proposals Due from Vendors	May 31, 2024
Proposals Evaluated by the Plan Committee Members	June 28, 2024
Vendor Presentations to Plan Committee Members	July 8, 2024 – August 5, 2024
Board Approves New Vendor	August 15, 2024
Contract Approval	September 19, 2024
Project Starts	November 1, 2024

C. CONTACT PERSON

The contact person for this RFP is the Executive Director, Donna Brito at 305-673-7039. Explanation(s) desired by vendors, regarding the meaning or interpretation of this RFP, including the option of a more detailed description of desired services, must be requested from the contact person, in writing, as is further described below.

Proposers are advised that from the date of release of this RFP until award of the contract, NO contact with the Trustees, City officers or Plan personnel is permitted, except as authorized by the contact person. Any such unauthorized contact may result in the disqualification of the Proposer’s submittal.

D. ADDITIONAL INFORMATION/ADDENDA

Requests for additional information or clarifications must be made in writing, via email, to Donna Brito at donnabrito@miamibeachfl.gov by May 6, 2024. The request must contain the Proposer’s name, address, phone number, and email address.

The Director will issue responses to inquiries and any other corrections or amendments as she deems necessary in written addenda prior to the Proposal Due Date. Proposer should not rely on any representations, statements, or explanations other than those made in this RFP or in any addendum to this RFP. Where there appears to be a conflict between the RFP and any addenda issued, the last addendum issued will prevail.

It is the Proposer's responsibility to be sure all addenda were received.

E. QUALIFICATIONS OF PROPOSER

- Vendors should carefully examine the entire RFP and any RFP addendums that may be published. Vendors should become fully aware of the nature of the work and the conditions likely to be encountered in performing the work. Factors to be considered in connection with a Proposer's capability to fully perform all requirements of the RFP include, and may not be limited to: experience, integrity, reliability, capacity, and other factors required to provide the Services defined by the RFP.

The Plan believes that to be successful the vendor must meet the following minimum qualifications:

- Seven (7) years of retirement administration software development and implementation experience.
- Have a minimum of ten (10) employee retirement systems software installations for defined benefit plans.
- A minimum of five (5) employee retirement systems currently installed on the version of the product being proposed.

As a part of the Proposal evaluation process, the Board may conduct a background investigation. Proposer's submission of a Proposal constitutes acknowledgment of the process and consent to such investigation.

F. PROPOSAL WITHDRAWALS

If Proposer wishes to withdraw its Proposal, such request must be submitted in writing to the Contact Person. Such withdrawal request should be sent in such a manner as to verify receipt.

G. PROPOSAL ACCEPTANCE, REJECTION OR RFP CANCELLATION

The Board reserves the right to reject any and/ or all Proposals or sections thereof, and waive any technicalities. As a matter of information, the Board does not bind itself to accept the minimum specifications stated herein, but reserves the right to accept any Proposal, which in the judgment of the Board will best serve the needs and interest of the Board. This offering of Invitation for Request for Proposals itself does not in any way constitute a contractual agreement between the Board and the Proposer. Furthermore, the Board reserves the right to award without further discussion.

H. ORAL PRESENTATION

If a formal oral presentation is requested to be made to the Board, or appointed committee, the presenter must be the primary account representative, and the backup representative will be expected to be present as well. Presentations should be in support of the Proposer's Proposal or to exhibit or otherwise demonstrate the information contained therein. If the Board wishes additional clarification of any information or additional information after the oral presentations, any of the Proposers may be requested to submit that information in writing.

I. SUBMISSION REQUIREMENTS

Each Proposal shall be prepared in a straightforward, concise delineation of the Proposer's capabilities to satisfy the requirements of the RFP. The emphasis in each Proposal must be on the completeness and clarity of content. In order to expedite the evaluation of Proposals, it is essential that Proposer follow the format and instruction's contained in Section III- Proposals Format. If the Proposer so wishes, the Proposal may be accompanied with brochures, promotional materials, or displays provided they are properly identified.

J. NEGOTIATIONS

The Board may award a contract on the basis of initial offers received, without further negotiations. Therefore, each initial offer should contain the Proposer's best terms from a cost or price and technical standpoint.

The Board reserves the right to enter into negotiations with the selected Proposer. If the Board and the selected Proposer cannot negotiate a successful contract, the Board may terminate said negotiations and begin negotiations with the next selected Proposer. This process will continue until a contract has been executed or all Proposers have been rejected. No Proposers shall have any rights against the Board arising from such negotiations.

K. LEGAL COMPLIANCE

The Proposer shall comply with all laws, ordinances, and regulations applicable to the services contemplated herein, including those applicable to conflict of interest and collusion. Proposers are presumed to be familiar with all Federal, State, and local laws, ordinances, codes, and regulations that may in any way affect the services offered.

L. REVIEW OF PROPOSALS

Each Proposal will be reviewed to determine if the Proposal is responsive to the submission requirements outlined in the RFP. A responsive Proposal is one which follows the requirements outlined in the RFP, includes all required documentation, is submitted in the format outlined in the RFP and is of timely submission. Failure to comply with these requirements may deem Proposer's Proposal non- responsive. The Board reserves the right to waive any failure of compliance in the Board's sole discretion.

SECTION II- SCOPE OF SERVICES

A. INTENT

It is the intent of the Board to solicit Proposals from Proposers interested in serving as Pension Administration Software Providers for the Fund.

B. SCOPE OF SERVICES REQUESTED

Statistics regarding the retirement system are provided below:

Item	Number
Number of active members	516 as of 9/30/2023
Number of dormant members	19 as of 9/30/2023
Number of DROP members	124 as of 9/30/2023
Number of retirees	535 as of 9/30/23
Number of Disabilities	48 as of 9/30/2023
Number of Beneficiaries	111 as of 9/30/2023
Number of Vested Members	11 as of 9/30/2023
Payments made by physical check	21 as of 3/31/2024
Net assets	\$1,133,364,828 as of 12/31/2023
Benefits paid during previous fiscal year	\$71,558,440 as of 9/30/2023
Fiscal year	October 1- September 30

Regular services to be provided by the Proposer shall include, but not be limited to, the following characteristics:

System Features:

- Single Fund with indicator for Police (P) and Fire (F)
- Self-directed DROP with two providers

Active Members:

- Maintain master file for active members
- Enroll/modify active members
- Import biweekly payroll data from the City’s Munis payroll system
- Ability to maintain a list of all Munis pay codes to:
 - Compute and validate the accuracy of service hours and pensionable wages, including the statutory 300-hour limit on overtime
 - Categorize pay codes into regular wages, allowances, overtime and off duty, and other pensionable wages for use in estimates and final benefit calculations
- Ability to process retroactive payroll adjustments prorated to the period earned
- Detect breaks in service based on termination date, rehire date and unpaid absences
- Maintain fiscal-year, calendar-year and life-to-date totals of prior systems account balances, biweekly payroll history, pensionable wages, service hours, employee contributions, buybacks, interest, etc.
- Prepare Estimates, Final Benefit and Disability Benefit calculations including:
 - Ability to calculate the overtime and off duty limit based on biweekly extended wages that vary between Fire and Police
- Buyback processing including:
 - Purchase of multiple types of buybacks using post-tax and pre-tax payments
 - Refund of buyback

- Annual benefit statements for active members including export of data to Excel for mail merge
- Annual posting of interest calculations and exit interest calculation
- Automatically set-up retiree data at retirement
- Various monthly active member reports

Retired Members and Beneficiaries

- Maintain master file for retired members and beneficiaries
- Add/modify member benefit records including:
 - DROP Entry
 - Commencement of Pension
 - Service Retirement
 - Deactivate Deceased Member
 - Activate Beneficiary for Deceased Member
 - Beneficiary Benefit Reduction
 - Service-Connected and Non Service-Connected Disability
 - Vested Retirement
- Maintain member change history, i.e. status, address, etc., with date and time stamp
- Monthly recurring pension payroll process including:
 - Global COLA processing each October 1
 - Monthly COLA processing, including several annual DROP COLA adjustments
 - Member count
 - One-time special benefit payment
 - Workers Compensation Offsets
 - Unlimited insurance deductions
 - Reversal for tax, deduction, net, or whole check,
 - Federal Withholding Taxes
 - Withholding tax calculator for old and new Form W-4P
 - Income Deduction Orders
 - IRC 415 limited pensions
 - Prenotes
 - Lump Sum Refunds or Rollovers, plus interest earned if applicable
 - Electronic direct deposit, DROP deposit, and bank's positive pay file
 - Check printing for pension and vendor payments
 - Archive of deceased, beneficiary and lump sum member records
 - Backup of pension database system
- Various monthly pension payroll reports
- Death audit file to be uploaded to The Berwyn Group
- Form 1099-R processing including:
 - Create electronic Form 1099-R File
 - Print and re-print Form 1099-R
 - Reports: Payment History, Pension Payments, \$3,000 Health Exemption
- Electronic submission of 945 Tax to Federal Tax Depository
- Off-cycle payment processing

- Close out fiscal and calendar year totals and maintain life-to-date payment history
- Generate printable mailing labels sorted by various criteria

Other Requirements

- Robust options to facilitate searches on most fields in the database and allow for search results to be exported to Excel.
 - Fiscal reports and data files for Actuary and State Division of Retirement
- Self-service Login Portal for active and retired members
- Portal to facilitate electronic voting for Trustee Annual Elections

SECTION III- PROPOSAL FORMAT

A. TITLE PAGE

Show the Request for Proposal subject, the name of your firm, address, and telephone number, name of contact person, email address and date.

B. TABLE OF CONTENTS

Clearly identify the material by section and page number.

C. ORGANIZATION QUALIFICATIONS AND BACKGROUND

1. Describe your firm's strengths, highlighting the aspects of your services that make you unique from your competition.
2. The vendor should provide a description of the vendor's company, including historical background, number of staff, number and location of offices and information demonstrating the financial strength of the company.
3. Summarize your organization's long-term strategy for business development.
4. What percentage of your annual budget is allocated toward research and development?
5. Does your organization anticipate any changes in ownership or organizational structure?
6. Is providing Pension Administration Systems your sole line of business? If not, describe what other services your firm provides and show the percentages of your organization's revenues attributable to the Pension Administration Systems as well as the other lines of services.
7. Are you a member of the Florida Public Pension Trustees' Association (FPPTA) or the International Foundation of Employee Benefit Plans (IFEBP) or any other related organizations?
8. Is the firm, any of its principals or employees, currently engaged in any litigation, with current or former clients, employee(s), or any other person or organization related to any of your business activities?

9. Has the firm or any of its principals or employees been convicted of any crimes in Florida or any other State?

D. CLIENTS AND REFERENCES

1. Please provide a summary of your firm's total clients including approximate membership size. Indicate a breakdown by public pension funds, corporate pension funds, Taft Hartley funds, and others. At a minimum, please include:
 - Total Pension Administration Software clients
 - Fund size of average client
 - Representative client list
2. Provide a breakdown of clients gained and lost in the past five years, including both member size and type. Indicate reasons for any clients lost.
3. Provide a list of at least five retirement systems (where possible retirement plans of similar size as ours) for which your firm currently provides services. Also provide the email address, telephone number, name and title of person who may be contacted for reference. Please obtain prior authorization for us to contact each reference.

E. PROFESSIONAL STAFF

1. Please list the number of staff specifically involved in providing retirement administration services and number of staff allocated to providing product support, including average years of experience for both service and support.
2. Are specific individuals assigned as a support or contact for accounts? If so, provide the name (s) and locations of the individual (s) who will be responsible for this account if your firm is awarded this contract. Provide a brief biography of each member of the team, including titles, functions, relevant work experience, and number of years with your firm.
3. If more than one person will be assigned responsibility for the account, how will the responsibility be allocated among these individuals?
4. How many client accounts are assigned to each of the persons named above? What is the maximum and average number of accounts assigned to each professional?
5. Summarize the average annual turnover in your firm cumulative over the last 3 years measured as departures divided by the total number of employees. Describe the turnover of key professional personnel during the past 3 years and provide a brief explanation of each. Describe the plans in place to ensure that any changes in staff are effected with a minimum of disruption to the services provided.

6. Comment on how your firm attracts and retains motivated qualified professionals. What are your firms 'continuing education requirements for its professionals?

F. PENSION ADMINISTRATION SOFTWARE SERVICES

1. Describe in detail your system and philosophy behind it. Is your system proprietary or did you obtain it from an outside source?
2. Describe how your product will address the requirements as outlined in the Scope of Services.
3. Describe your methodology for project implementation and project management.
4. Provide a detailed plan regarding your process of data conversion, transition assistance and program testing including business continuance processing.

G. OTHER

1. Please describe any services that you can provide that have not been covered in previous sections. Discuss associated fees, if any.
2. What are your firms' levels of insurance coverage for errors or omission and general liability insurance? Will you provide certificates if your firm is hired and annually thereafter?
3. The Board intends to have both functional and technical resources available during Project implementation. Additional resource planning will be done based upon the selected Respondent(s). Respondents shall clearly indicate in the proposal the estimated level of Board's resource involvement in the implementation process, in order to allow the Board to perform adequate planning.

H. FEES

1. Please provide a proposed fee schedule to encompass all of the items listed under the scope of services for a five-year period, including startup costs, annual or monthly maintenance costs, hosting costs, etc.
2. The vendor should also include any additional information including pricing regarding data hosting.
3. In addition, provide a separate fee schedule for any additional programming services you could provide that would not be done on a regular or at least annual basis.

I. PROPOSER'S WARRANTY

1. The Proposer's Warranty must be completed and submitted with the Proposal.
2. The vendor must warrant that the proposed solution will operate in accordance with the documentation delivered as part of the implementation project for a period of one year. This

includes a commitment by the vendor to remedy any defects that are noted by the Plan users within the 365-day warranty period.

J. ATTACHMENTS

1. Attach a sample benefit estimate and member statement.
2. Attach your standard contract.

SECTION IV- EVALUATION AND SELECTION PROCESS

A. EVALUATION CRITERIA

Proposals will be evaluated by the Board (or committee thereof) in order to ascertain which Proposal best satisfies the scope of the services requested. Evaluation consideration will include, but not limited to, the following:

- Responsiveness of the Proposal in clearly stating an understanding of the work to performed.
- Technical ability of the vendor to perform requested services.
- Experience of Proposer.

The fees and expenses, as requested in Section III (H) are a significant factor. Fees and expenses will be a particularly important factor when all other evaluation criteria are relatively equal.

The Proposals will be evaluated to ensure that all material requirements of the Request for Proposals are met. Those Proposals determined to be responsive will be further evaluated based on the above.

B. SELECTION PROCESS

The contractor will be selected from the qualified vendors submitting responses to this Request for Proposals. The Board, or a designated committee, will review all the proposals and select the firms who will be invited to make an oral presentation. The Board reserves the right to request additional information and to delay the process until it is satisfied that it has all the information needed to make a responsible decision.

C. PUBLIC DISCLOSURE

The information submitted by the vendor, including any statements and letters, shall be subject to public disclosure as required by federal and state law.

SECTION V- GENERAL PROVISIONS

A. CONTRACT AWARD

The award, if any, shall be made to the Proposer who's Proposal shall be deemed by the Board to be in the best interest of the Board. The decision of the Board of whether to make the award and which Proposal is in the best interest of the Board shall be made with the sole discretion of the Board and shall be final.

The Contract to be entered into with the successful Proposer will designate the successful Proposer as the Board's Contractor and will include, but not be limited to, the following terms and conditions.

B. GENERAL TERMS AND CONDITIONS

Following are the General Terms and Conditions, supplemental to those stated elsewhere in the Request for Proposals, to which the Vendor must comply to be consistent with the requirements for this Request for Proposals.

Any deviation from these or any other stated requirements should be listed as exceptions in a separate appendix of the Proposal.

1. Public Entity Crimes. Section 287.363 (2)(a), Florida Statutes, contains the following provisions: "A person or affiliate who has been placed on the convicted vendor list following a conviction for public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.
2. Indemnification. The Contractor shall agree to indemnify and save harmless the Board and its officers, agents, attorney and employees, from and against any and all liability, claims, demands, fines, fees, expenses, penalties, suits, proceedings, actions and costs of action, including attorney's fees for trial and on appeal, of any kind and nature arising or growing out of or in any way connected with the performance of the contract whether by act or omission or negligence of the Contractor, its agents, servants, employees or others, or because of or due to the mere existence of the Contract between the parties.
3. Applicable Law. The contract and the legal relations between the parties hereto shall be governed and construed in accordance with the laws of the State of Florida. Jurisdiction and venue for any disputes shall be in Miami Dade County.
4. Conflict of Interest. Any prospective Proposer must make an affirmative statement to the effect that its retention, if selected, shall not result in a conflict of interest, or create an appearance of impropriety with any person or organization that may be affected under this program. Should any potential or existing conflicts to be known by a prospective consulting firm, said prospective consultant must specify the person or organization with which the conflict exists or might arise, the nature of conflict and whether the prospective consultant would or would not step aside or resign from the conflicting engagement or representation if selected.

PROPOSER’S AUTHORIZATIONS

The following authorization must be included with the response to this Request for Proposal:

1. I am an officer of the organization.
2. I have been specifically authorized to offer a proposal in full compliance with all requirements and conditions as set forth in this Request for Proposal.
3. I have fully read and understand the Request for Proposal and have full knowledge of the scope, nature, quantity, and quality of work to be performed. I have carefully prepared the proposal upon the basis thereof and state that the amounts set forth in this proposal are correct and that no mistake or error has occurred in this proposal or in the computations. I agree to make no claim for reformation, modification, recession, or correction of this proposal after the scheduled closing time for the receipt of proposals.
4. If this proposal is accepted, a contract will be issued as proposed, subject to any revisions which may be mutually agreed upon by the Board and the Proposer.

Firm Name

Submitter’s Name and Title

Submitter’s Signature

Date

Appendix A- City of Miami Beach Technical and Security Supplement

There are two possible configurations for the responding vendors to use. The first is an inhouse deployment of an application and database on the City of Miami Beach (“CMB”) network. The second would be an internet or cloud-based solution.

Common to both configurations:

Authentication –

1. All access will be authenticated through a multi-factor login process.
2. Users of the systems must be assigned group membership based on needs. Common groups might include systems administrators, plan administrators, plan members, non-interactive service accounts.
3. Can the proposed system support Azure SSO for active CMB staff and a application based users account for retired and or non-CMB plan members.

Authorization -

1. Members of specific groups will be granted minimum access rights by the application based on their group memberships.

Multi-factor authentication (MFA)

1. An industry standard MFA will be deployed for all front-end access. (Front end refers to through the application)
2. All MFA solutions must not be based on Text messaging as a secondary OTP delivery. Support for MS or Google Authenticator apps or similar service must be supported.
3. If the systems support both Azure SSO and application based local accounts logins both must support MFA.

SLA’s

1. The city will be responsible for any downtime caused through the network and servers under our operational control.
 - a. Current CMB availability is over 99.999%
2. Resolution timelines for outages based on application failures that are only under the control of the vendor must be documented within the contract. This includes any data clean-up required to bring the application back to a current operational state.
3. If the system is cloud based, the vendor must state their SLA’s and can be no less than 99.99% full availability on a 24x7x365 basis.
 - a. Pre-planned maintenance that is properly scheduled and communicated will not count against the availability.

In-House Deployment

Architecture

1. The systems must be composed based on a 3-tier architecture. (Other architectures the vendor may propose must be reviewed and approved by the CMB IT staff)
 - a. Web Server – accessible from inside and outside users
 - i. The web server could be a load balancer acting as the web server.

- b. Application servers must sit inside our firewall preferably on a segmented DMZ.
 - c. Database server which sits with in internal network and meets all requirements of the CMB Data Architect team.
2. Communications between the end user and the web site, the web site and the application server, and the application server and the data base must all be over encrypted links only.
 - a. The use or current encryption must be maintained and supported by the application. This is currently a certificate-based TLS 1.2 or 1.3.
 3. All systems components must be kept up to date with security patching within a 30-day window of patch release. For vulnerabilities discovered with no available update the vendor must work with the CMB to deploy any recommended work arounds.

Cloud Hosted Deployment

Data Center

1. The data to be placed in the system will be individually identifiable and protected private information for badged members of the CMB police and fire departments.
 - a. The data can only be stored within a CJIS approved data center.
2. Backup and restoration of the CMB environment must also meet CJIS requirements.
 - a. Retention periods, restoration timelines must meet the CMB pension plan team requirements.
 - b. Must be fully encrypted, stored at multiple data centers or approved multi-homed solution.
 - c. A minimum of one backup within a CMB approved restoration period must be maintained in an offline and immutable manner.
 - d. If the CMB component of the system is operating in a shared services environment, restoration of just the CMB environment must be available.
3. Any access to the data must be logged through the application.
4. Any access to the data by vendor personnel must be through the application.
 - a. No data access directly from the database.
5. The systems must be evaluated for vulnerabilities on a scheduled basis.
 - a. All vulnerabilities must be addressed for resolution.
 - i. Any with a rating over 3.5 must be remediated within 30 days or less.
 - ii. Any with a rating over 4.5 must be immediately addressed.
6. At contract termination for any cause the data belongs to the CMB and must be made available for download and or migration to a new system at reasonable efforts and time.

Application

1. The total system must meet design criteria that is based on industry standard cloud security principles.
2. The data must only reside within the United States
3. The data must be stored with encryption. (Preferred full database encryption.)
4. Changes to any component of the systems must be tracked through a change control process.
 - a. If the applications is to be based on a no-code/Low code solution or through a real-time deployment process, a full CASB must be in place.

For both configurations from the Data Management and Governance Standpoint

1. System must be capable to receive data from Munis (current system of records for employee and payroll data), to ensure adequate records management and consistency (address and last name changes as well as other updates).
2. Existing data (current and archived) must be imported into the system to ensure business and reporting continuity. Full data migration must be achieved.
3. System must be capable to produce the reports needed from the operations standpoint, determined by the LOB.
4. System must provide data integration capabilities via API, sFTP or similar in order to create custom analytics if needed.